Student Financial Assistance

THE U.S. Department of EDUCATION

Pell 2002- 2003 Processing Changes

Objectives

- **Who is COD affecting?**

- **Where do I fall in the COD picture?**

- **What changes apply to me?**

- **What are the changes?**

- **And the Web?**

- **What is coming next?**

- **What is this COD thing?**

Who does COD affect?

- **All Schools are going to be processed by the Common Origination and Disbursement System**

- **Not all schools are going to be using the Common Record**
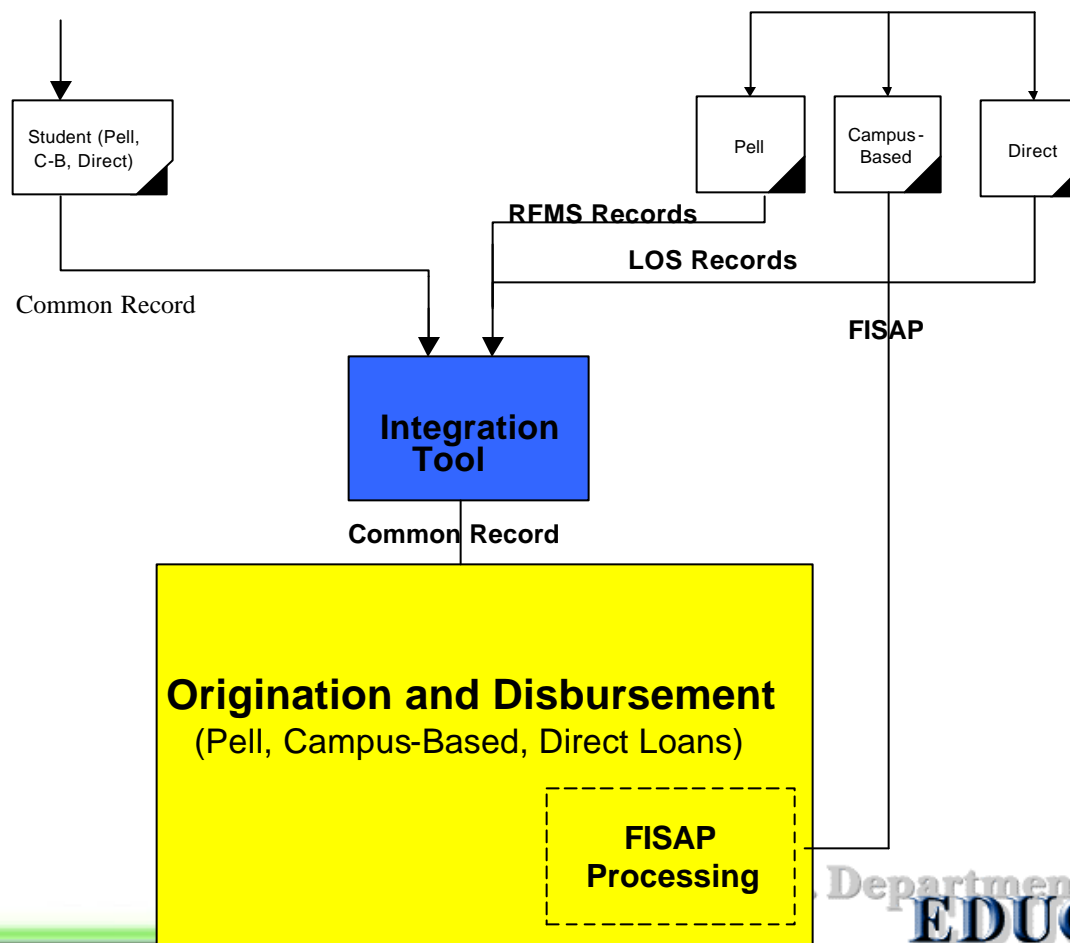
- **Full Participant and Phase-In Schools**

COD: Who's Who

Full Participant

Phase-In Participant

Student (Pell, C-B, Direct)

Pell

Campus-Based

Direct

RFMS Records

LOS Records

Common Record

FISAP

Integration Tool

Common Record

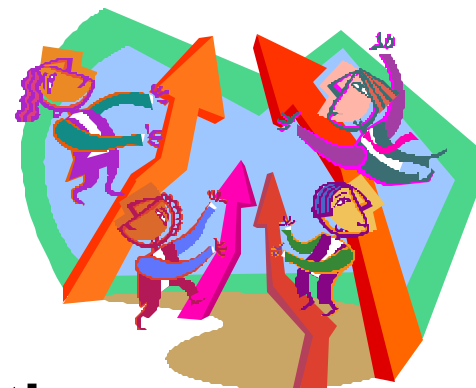**Origination and Disbursement**
(Pell, Campus-Based, Direct Loans)

FISAP Processing

Who's Who: The Scorecard

Schools	Common Record	New Process	New Web Functionality	Many Schools	COD
Full Participant	Yes	Yes	Yes	Few	Yes
Phase-In	No	No	No	Many	Yes

Changes For 02-03

- **Record Layouts**

- **Process**
  - Identifier Changes
  - POP
  - Edits
  - Institutional Data Record Removed

  - Verification
  - Enrollment Status
  - Pennies

- **Web**

- **Customer Service**

Changes for 02-03 – Record Layouts

■ **Added Negative Pending Amount to Origination Acknowledgement**

■ **Added Cents to the Award Amount on the Origination (and Acknowledgement) Record(s)**

■ **Addition of five new fields to multiple records:**

– **Current SSN**

– **Date of Birth**

– **Last Name, First Name, and Middle Initial**

■ **Added to the Origination, Data Request, MRR and YTD records**

Changes for 02-03 : Identifier

- **The new demo info used to create the new student identifier information in COD**

- **Current SSN, Date of Birth and Last Name (CPS Transaction Number)**

- **These components used to tie student to CPS information**

- **To make changes to these fields, CPS must be updated**

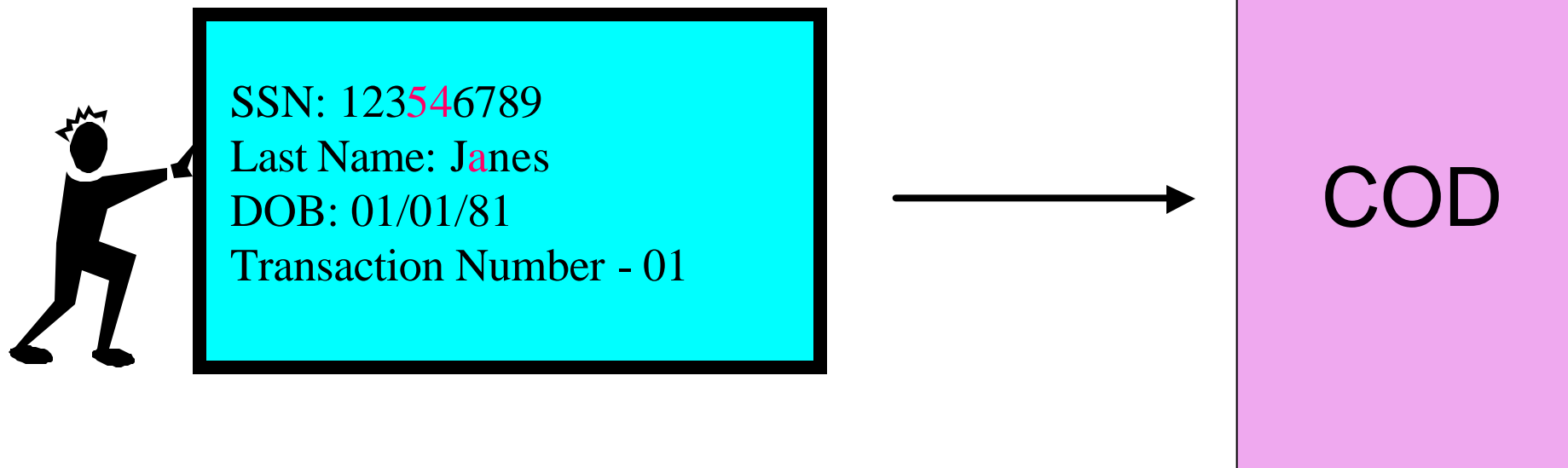- **Update COD by re-originating the student with a new CPS Transaction Number**

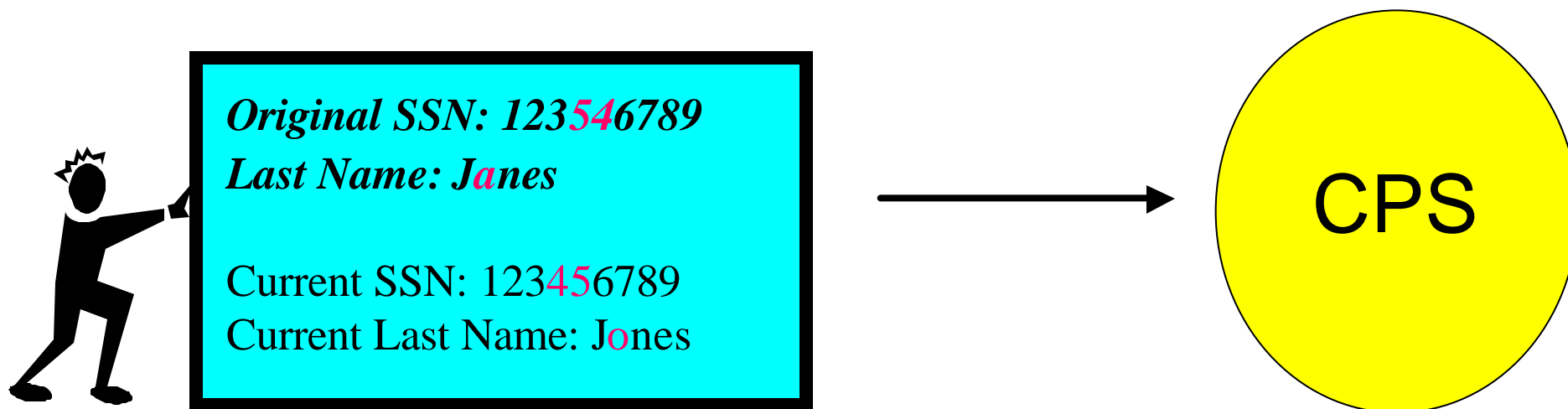# Student Identifier

Step 1 – Student Files FAFSA
(Transaction 01)

Original SSN: 123546789
Last Name: Janes

Current SSN: 123546789
Current Last Name: Janes

CPS
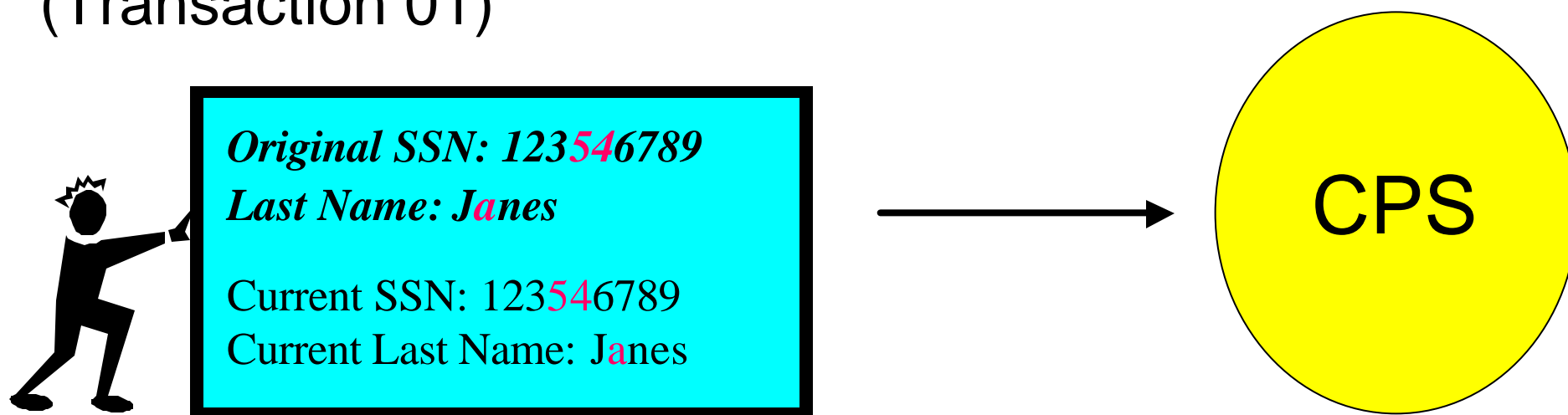
The Student Makes a mistake on SSN and Last Name

Step 2 – School Sends in Origination to COD

SSN: 123546789
Last Name: Janes
DOB: 01/01/81
Transaction Number - 01

COD

Step 3 – Student Corrects SSN &
Last Name (Transaction 02)

Original SSN: 123546789
Last Name: Janes

Current SSN: 123456789
Current Last Name: Jones

CPS

Step 4 – Submission to COD

SSN: 123456789
Last Name: Jones
DOB: 01/01/81
Transaction Number - 02

COD

NEW
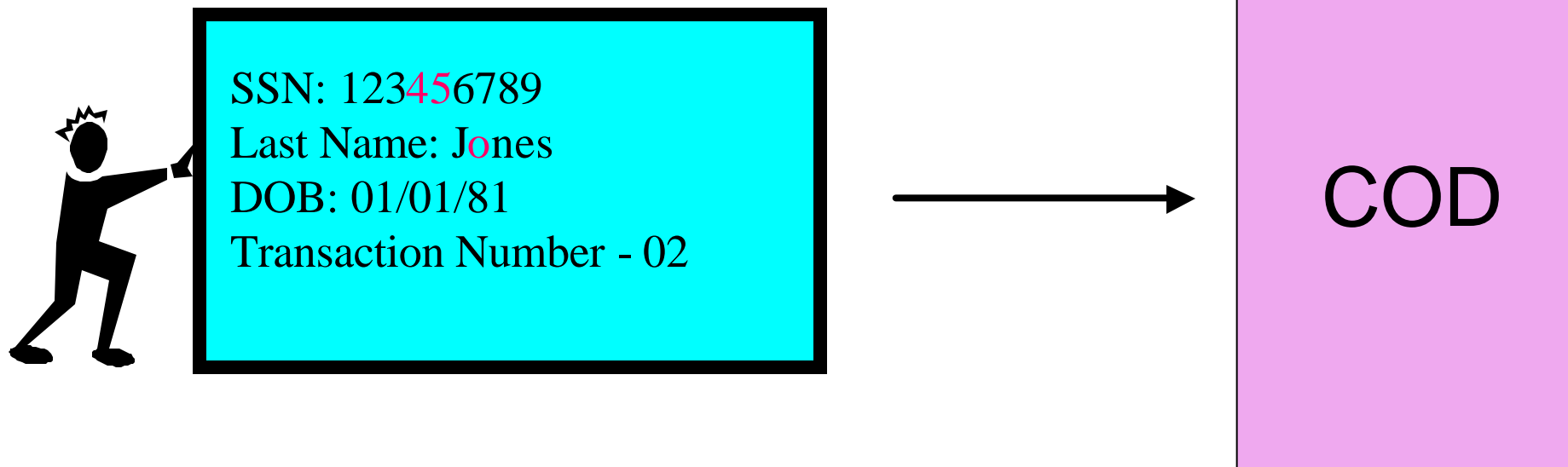
NEW	OLD
Overawards allowed to exist for 30 days	Pell did not allow overawards for any period of time
MRR is produced informing all schools involved of the situation and providing contact information	MRR is produced informing all schools involved of the situation and providing contact information
If after 30 days the situation has not been remedied all schools involved will receive a negative disbursement. Eligible school submits positive disbursement.	Required submission first of a negative disbursement and then a positive disbursement

■ **Valid Values for Verification are now "W" (Without Documentation), "V" (Verified) and "Blank"**

■ **Schools may report a Verification of Status of "W" for students that do not have completed documentation**

■ **Once the student's documentation has been completed a school must report a status of "V" (verified) for that student in order not to have that student's disbursements limited.**

Changes for 02-03 - Pennies

- **We've added the ability to report pennies in the Origination Award Amount**

- **If the school is using whole dollars, they must zero fill the two places after the decimal (implied decimal)**

Changes for 02-03 - Edits

- **Adding edits for the new identifier fields**
  - Current SSN -332
  - DOB - 333
  - Student's Name - 334, 335, 336

- **Verification Status – Only "V", "W" or "Blank" will be accepted**

- **Enrollment Status – Will not be edited**

Change to Pell Edits

- **Edit on Pell Eligibility - 337 "Student Not Pell Eligible for Award Year 2003 and beyond"**

- **Duplicate Match on CPS - 338 "Duplicate Match on CPS for Award Year 2003 and beyond"**

- **Origination Award Amount of Zero - 339 "Origination Reported with Zero Award Amount for Award Year 2003 and beyond"**

Web – Phase-In Schools

- **All rejects for Pell Grants stored and viewable via the web (except batch level rejects)**

- **Web access to:**
  - **Real-time processing statistics (e.g.: # submitted, # accepted/ rejected/ corrected, % rejected by edit type). Helps schools improve business process**

  - **Consolidated funding information (e.g.: $ drawn by program, timeliness of reporting)**

- **Single web site access to Pell Grant, Direct Loan and campus-based (optional) information available at all times, 24x7**

Web: Phase-In Schools

Web: Phase-In Schools

COD Transition

Customer Service Transition

Award Year 01-02	All Origination Disb. Records	PELL ⟷	RFMS ⟷	**Pell Customer Service Center**
		DL ⟷	DLOS ⟷	**Direct Loan Customer Service Center**
Award Year 02-03 03-04	Full Participant / Phase in Participant	**Common Record** ⟷ / PELL ⟷ / DL ⟷	SFA Integration Tool ⟷ COD	**COD Customer Service Center Niagara Falls**
Award Year 04-05	All Schools	**Common Record** ⟷	COD ⟷	**COD Customer Service Center Niagara Falls**

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Customer Service Transition
The Call Center Solution

?

**Award Year
2001-2002
and prior**

?

**Award Year
2002-2003**

**Incoming Call
(Current Pell and Direct
Loan Numbers)**

**Caller chooses award year
he/she is calling about**

Pell Customer Service

**Loan Origination
Customer Service**

**COD Customer Service
(Niagara Falls, NY)**
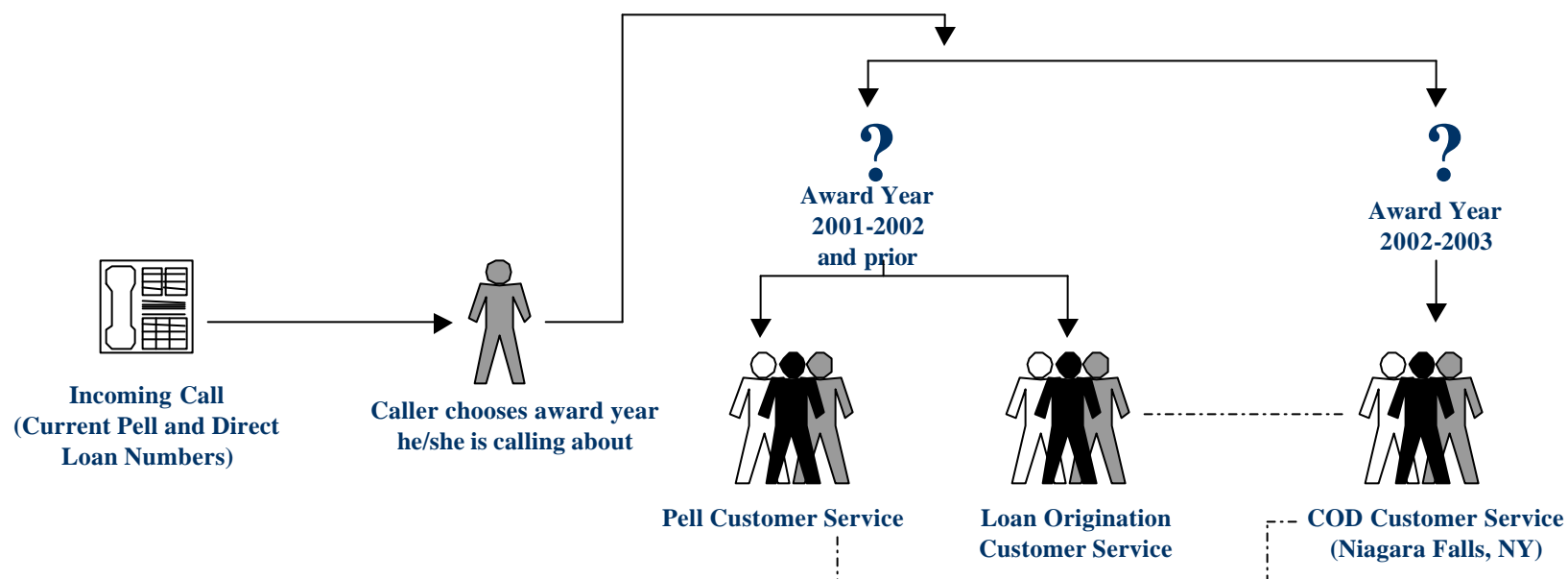
Customer Service Timeline

March 2002 Through March 2003

Customer Service Centers working together

Begin March 2002

- COD Center Opens
- Updated Voice Response unit to direct calls
- COD customer service accepting calls for 2002/2003 award years
- LOC customer service accepting calls for 2001/2002 award years and prior
- RFMS customer service accepting calls for 2001/2002 award years and prior
- Prom Notes continue to be mailed to LOC
- Accepting Applicant Services calls at LOC

| March 2002 | Dec 2002 | Mar 2003 |

Dec 2002

- Migration of open LOS data to COD
- Migration of RFMS data to COD
- Customer service functions transfer to COD
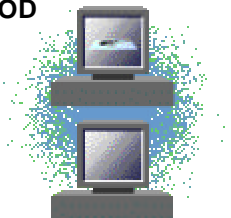
March 2003

- Archive closed LOS data
- Applicant Services functions transfer to COD representatives
- All school services calls are answered by COD representatives
- COD processes credit appeals & incoming correspondence

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COD Timeline

2001		2002				
Nov	Dec	Jan	Feb	Mar	Apr	May

4/29 – Additional COD Capabilities

3/18 – COD Goes Live

3/8 – InterSystem Test Complete

2/15 – SFA User Acceptance Test Complete

1/20 - System Integration Test Complete

12/11 – COD System Development Complete

11/17 - COD Technical Reference posted to IFAP
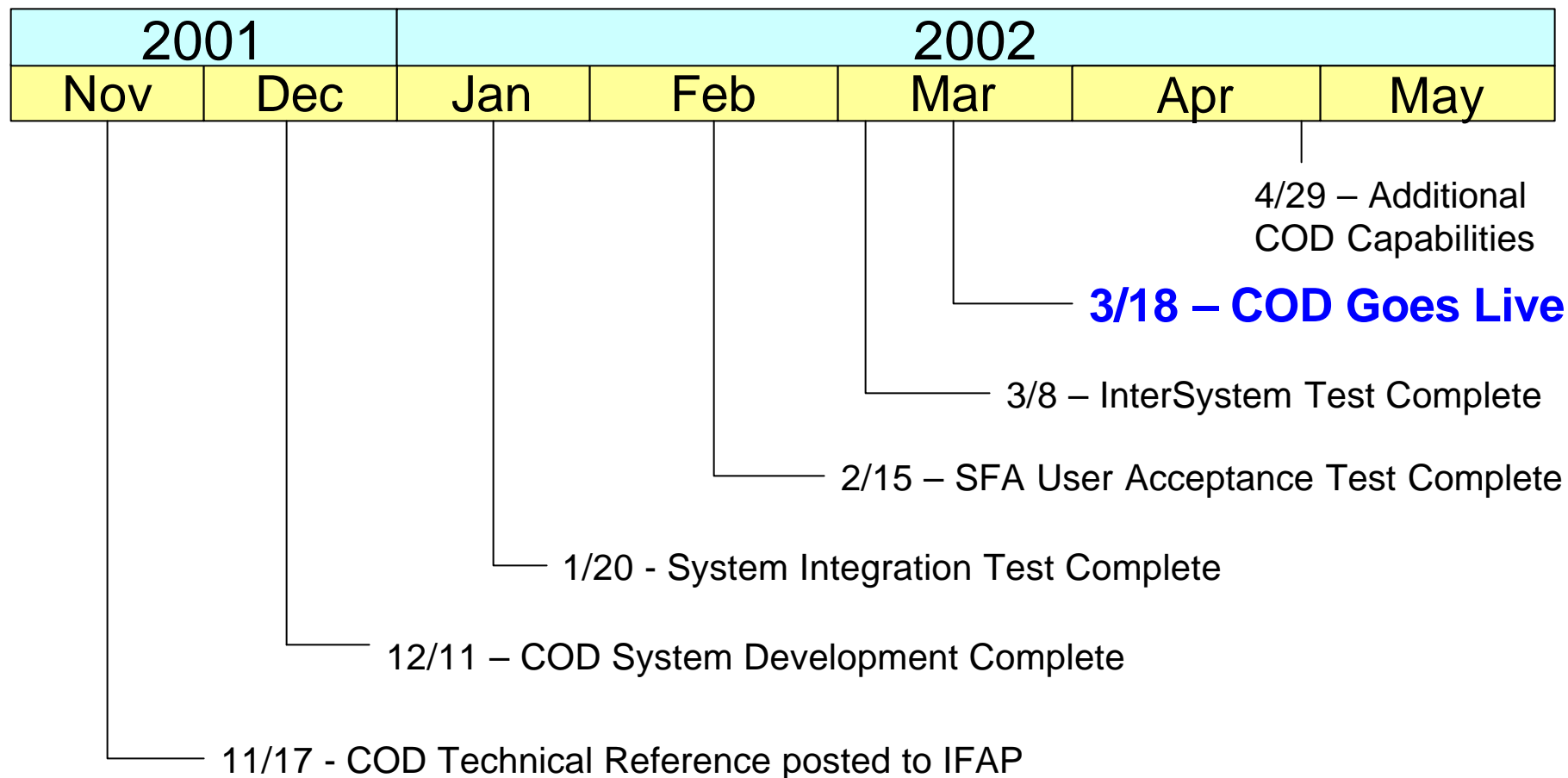
Data Migration

- **Direct Loan (DLOS)**
  - Planned System Retirement in December 2002
  - All schools must close out Award Year '01-'02 and prior years by December 2002.

- **Pell Grant (RFMS)**
  - Planned System Retirement in December 2002
  - All prior year data will be migrated in November 2002

More Information on COD

- **Other EAC Sessions**
  - Session 32 – Direct Loans: 2002-03 Processing Changes
  - Session 33 – Customer Service: The New Integrated Customer Service Center for Pell, Direct Loans & Campus Based
  - Session 35 – COD: What is the Common Record?
  - Session 39 – COD: The Big Picture
  - Session 41 – Tools for Monitoring Pell and Direct Loan Funds

- **IFAP Website (www.IFAP.ed.gov)**
  - Common Origination and Disbursement section
  - Technical Reference – DLOS, RFMS and COD
  - Updates and Frequently Asked Questions

- **COD On-Line Training – Spring 2002**

Pell Grants

- **E-Mail Address:**
  pell.systems@ed.gov

- **Pell Grant Hotline:**
  1-800-4PGRANT
  1-800-474-7268

- **Pell Grant Technical Reference**
  - IFAP
  - SFA Download

Questions